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ABSTRACT

To improve the JOBS program of the National Alliance of Businessmen Metros, a feasibility study was conducted in which existing technical assistance programs were examined, problems analyzed, and recommendations formulated. The study resulted in the "Guide" to be used in promoting effective company training programs for disadvantaged people. It outlines ways in which a link may be established bewteen companies needing assistance by a group of volunteer people who have experience in one or more components of the JOBS Program. The volunteers' time devoted to technical assistance ordinarily would be contributed to NAB by their employers. The Metro office would coordinate the activities of volunteers with the needs of requesting companies. The "Guide" explains what technical assistance is, how it works, what it can and cannot do. Suggestions for determining whether or not a Metro should provide a technical assistance program and for organizing and implementing a program are detailed. The "Guide" should be viewed as a companion to "Productive Employment of the Disadvantaged: Guidelines for Action," available as ED 080 693. (AG)

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A GUIDE FOR UTILIZING

VOLUNTEER TECHNICAL ASSISTANCE

BY A

NATIONAL ALLIANCE OF BUSINESSMEN (NAB) METRO

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FOREWORD

When the National Alliance of Businessmen committed itself to the JOBS program, we undertook a continuing quest for ways of improving the effectiveness of these programs. We recognized that we needed a format through which we could help Metros strengthen their operations and make the best possible use of available resources.

It seemed to us that a technical assistance program, which utilized our cumulative experience and was flexible enough to adapt to local conditions, might be the answer. Accordingly, we arranged to have the Human Interaction Research Institute, of Los Angeles, carry out a feasibility study on our behalf. In this study, they examined a number of technical assistance programs that were already under way, analyzed some of the problems that manifested themselves, and formulated recommendations concerning desirable procedures for organizing and implementing a technical assistance program.

The end-product of that feasibility study is this guidebook. We believe that it contains an abundance of concrete, experience-tested suggestions for making advantageous use of technical assistance. We hope that Metros that are sharing in the NAB/JOBS effort will find it helpful.

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I. INTRODUCTION

This guide is for the use of National Alliance of Businessmen (NAB) Metros in promoting effective company training programs for disadvantaged people. Many Metros do not have the internal expertise to assist companies in developing and conducting such programs. Such expertise, however, exists in almost all communities but Metros often may not know how to link it with companies needing assistance.

This guide outlines ways in which such a link may be established through a program of technical assistance provided by a group of volunteer people who have experience in one or more components of the JOBS Program. It discusses company needs for technical assistance in developing and conducting effective training programs. In addition, it explains ways in which Metros can take the leadership in supplying that assistance and suggests various aspects and strategies for the Metro's consideration in organizing and implementing voluntary technical assistance.

The basic idea for Metros desiring to develop such a program is to organize a group of selected volunteers who will assist the companies requesting help. The volunteers' time devoted to technical assistance ordinarily would be contributed to NAB by their employers. The Metro office would coordinate the activities of the volunteers with the needs of requesting companies.

Our experience suggests that it is advantageous, in such technical assistance programs, to make every effort to include among the corps of volunteers

persons who have in the past served as loaned executives and Metro directors. Among the benefits that ensue are:

1. The loaned executives will realize that their knowledge and experience will be utilized beyond their initial tour with Metro. This will tend to strengthen their sense of involvement and commitment.

2. The company with which the executive is associated will gain a reputation as a recognized authority on one or more aspects of NAB/JOBS.

3. The Metro office will be provided not only with valuable sources of technical assistance but also with a sound continuity of operations, as executives who have shared past problem-solving with them are, in effect, on call for guidance and help.

This guide is designed primarily for Metro directors and personnel. However, it also may be of value to administrators and program managers responsible for training programs for workers with special employment handicaps--educational, physical, economic, emotional, cultural. It should be viewed as a companion to Productive Employment of the Disadvantaged: Guidelines for Action* (Glaser & Ross, 1973), which deals with the components of quality manpower training programs.

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*Obtainable from Mr. Judah Drob, Chief; Division of Research & Development Utilization; Manpower Administration; Department of Labor; 601 D Street, N.W., Room 9112; Washington, D.C. 20013.

II. TECHNICAL ASSISTANCE

A. What It Is

A program of technical assistance pools the skills of a variety of experts to provide specialized help, as needed, to employers engaged in manpower programs for disadvantaged persons.

In the larger metropolitan communities, there are usually many persons with sufficient experience with JOBS to provide comprehensive assistance to employers.

The concept of voluntary technical assistance is an extension of the general concept of voluntary participation in the JOBS Program and the voluntary contribution of loaned executives' time to staff the NAB organization.

There are a number of other advantages to a voluntary program. It permits the part-time involvement of a wide variety of specialists and it uses their help judiciously to improve employers' internal capabilities to run programs for themselves. It also enables loaned executives who have completed their tour of duty with a Metro to continue to participate in the program.

Perhaps the greatest benefit to a Metro in organizing and managing a volunteer technical assistance effort is that it strengthens the Metro's link between the business community and training and support service resources in the community.

B. How It Works

Technical assistance may be used to help employers design training programs; to help companies improve their retention rates; to help supervisors and other members of an employer's staff and work force conduct a training program; and to help employers locate resources and experienced training personnel.

Technical assistance also may help employers see their JOBS Program as a potential for fulfilling their requirements for an Equal Employment Opportunity Program (EEO) or to conform to Affirmative Action guidelines of the Federal government. While NAB cannot in any official way advise companies concerning EEO, many task force members have had extensive experience in companies that have carried out effective programs. These experts can provide counsel unofficially to participating companies.

Here are some examples of how technical assistance works:

1. Technical assistance from a generalist

A company considering participation in a JOBS Program is interested in finding out about the JOBS Program experience and track record of another company of similar size and product line. A JOBS Program manager from the experienced company can provide technical assistance by having discussions with the prospective employer, covering "how to," "our experience" and "problems to avoid." If the prospective employer decides to proceed, the experienced program manager can help him design an appropriate program to fit his situation.

2. Technical assistance addressed to an employer's specific needs

An employer who previously hired only trained personnel decides to enter into a program to train disadvantaged workers for jobs that require some skills. He wants to train these people for jobs in three classifications and needs assistance in designing an appropriate vocational training program. Technical assistance, in such an instance, can be provided by a vocational education expert. In their respective areas, several NAB Metros have excellent relationships with community colleges and vocational training centers which have such experts. They regularly arrange for conferences between interested companies and vocational training experts. In this manner, sound training programs have been developed. Such schools normally are eager to cooperate with employers.

3. Technical assistance that provides specific training experiences

Most training components are conducted by company staff or subcontractors (because those components require a continuing involvement over a significant period of time). Some components, however, are time-limited and can be conducted by other individuals with specific experience and skills. For example, employers who need to prepare their management and supervisory staff to conduct a program and who first need to orient them to the special needs of the disadvantaged may call upon outside help. In one such instance, three individuals were specifically selected to orient a company's staff in three specific areas: (a) supervisory skills needed to work with disadvantaged individuals; (b) Mexican-

American cultural characteristics found in the disadvantaged target groups; and (c) some special characteristics and needs of young, black men who were a second target group for this employer.

4. Technical assistance used to train NAB Metro personnel to work with employers

Some NAB Metro staff members, such as Contract Service Representatives (CSRs) and Manpower Coordinators, by virtue of their long experience in the Employment Service (ES), may have the skills to help employers plan programs. Other personnel--especially newly loaned executives--may not have had the experience that enables them to address employers' questions.

Technical assistance can help orient these able people to the mission of NAB so they understand the importance of their undertaking and can learn to use the resources available to them to make it a successful one.

5. Technical assistance used to orient NAB solicitors

Often, as a result of their determination to market the NAB program (both non-contract and contract) NAB solicitors do not properly describe what is required to have a successful program for disadvantaged trainees. They may not really understand the realistic requirements of a training program. Technical assistance resource people can help inform solicitors about the problems and opportunities in training disadvantaged hires.

As an example, one company (which rebuilt automobile equipment) agreed to a contract because of a presentation by an over-eager solicitor who had ignored the facts that the jobs being offered by the company were dead-end, the salary was low, and the working environment was poor. The company planned to hire disadvantaged trainees and put them on the job at the same rate of pay as their other entry-level workers, essentially without any training or supportive assistance. The contract provided an unending source of difficulty for the CSR monitoring it. When the company applied for a second contract, a technical assistance resource person was able to point out to them, in detail, what would be required to have a successful program.

When the CSR presented this list to the company, the company stated it could not fulfill the requirements. The CSR refused to support the company's application for a second contract. If the company had received this kind of consultation at the time it had applied for its first contract, it would have spared wear and tear on the trainees and have avoided difficulties the contract had engendered for the Metro.

C. What It Can Do

An organization of experts functioning as a technical assistance task force can play a variety of roles.

1. A technical assistance task force can enable NAB Metros to maintain and strengthen their role with participating companies in a number of ways such as the following:

   a. Help companies in the development of a JOBS proposal. The JOBS contract, its obligations and requirements and the nature of the government's involvement should be candidly appraised, including a realistic discussion of the funding process. The monitoring procedures should be made clear to the company. They should be prepared

for the likelihood that there may be frustrating delays and burdensome details as they negotiate the contract with DOL. This type of interpretation can be provided advantageously by technical assistance personnel.

> In one instance, a small company had done an excellent job hiring and training a number of disadvantaged employees under a JOBS contract. At the end of the contract period, the DOL contracting officer questioned the company about how they had provided supervisory training. The company, having been informed by NAB at the beginning of the contracting process that it was necessary only to fit new hires into the regular company program, had not arranged for formal supervisory training. There was no way for the company to verify the times and places of supervisory training because NAB had led them to believe that keeping such records was not really necessary. Funds in the contract which theoretically were allocated for supervisory training were disallowed by the DOL contracting officer. Had an experienced technical assistance resource person been consulted during the contract negotiations, he might have been able to interpret DOL's interests to the company so that proper records would have been kept, and the difficulty would have been avoided.

b. Orient companies' personnel to the special training needs of disadvantaged hires.

c. Bring companies into contact with the community resources that can supply educational, training and support services assistance.

d. Help companies review and assess the performance of their own programs.

e. Help companies redesign entry-level jobs and create job ladders.

f. Assist companies in meeting their Equal Employment Opportunities and Affirmative Action obligations. Task force members who can help companies plan long-range programs to demonstrate compliance should be recruited. This counsel will be informal and unofficial, but potentially can be extremely helpful.

2. A task force can help NAB Metros strengthen their internal capabilities in the following ways:

   a. Provide continuity and stability through successive NAB Metro administrations thus reducing the adverse effects of frequent changes in NAB Metro personnel. One way of achieving this is to involve former loaned executives in the task force.

   b. Train NAB Metro staff. While loaned executive staff may have a considerable depth of understanding of the needs of business, they often do not understand the special problems employers face in hiring disadvantaged employees. A task force makes available an invaluable experience base to which loaned executives can turn for information and support, increasing the effectiveness of their marketing activities.

   c. Help design marketing programs and participate in marketing effort. Experience with employers provides task force members with special insights about employers' concerns. Marketing strategies can be designed to address those concerns.

In particular, when task force members accompany NAB solicitors on visits to prospective employers, they can provide much reassurance to those prospective employers that similar programs have worked in their own and other companies.

Furthermore, properly oriented solicitors or technical assistance personnel can help employers perceive their involvement in the program as being related to the development of quality employees who can contribute meaningfully to the company's efforts.

As a by-product of encouraging employers to pledge jobs only if they will also make a meaningful training effort, the relationship between NAB Metro and local ES offices may improve.

> In at least one area of the country, ES viewed the NAB pledging program with considerable cynicism because (they alleged) only two or three percent of the pledges result in real placements of candidates sent by ES. In one instance, a technical assistance resource person arranged a meeting between local NAB and ES officials to develop a plan to follow up on pledges to see that actual hires are made and supported via a close working relationship among the Metro, ES, and the employers.

d. Augment the effectiveness of CSRs in contracting and monitoring functions by serving as a source of useful information to CSRs when they evaluate proposals, help employers prepare proposals and monitor employers' efforts.

Task force members also can be a bridge between the CSR and the private employer. Many private employers resist the CSR, when he appears, because he is a government employee. When introduced by a task force member who ordinarily is from the private sector, and who is functioning under the sponsorship of NAB, the negative reaction of many employers toward the CSR can be eased or eliminated.

e. Help NAB Metros become more effectively involved with manpower problems in the community. As a NAB Metro becomes a resource to businessmen, community agencies and other groups, the community may turn more and more to the NAB Metro to provide general leadership in the community manpower efforts. NAB can tie together the efforts of social welfare and minority support groups to help their clients get jobs. If NAB can coordinate these efforts, it is likely to find that these groups can serve as a resource to them and that NAB, in turn, will be viewed as a resource rather than a competitor.

> In one community, the NAB Metro office sponsored a monthly meeting of agencies serving and representing various minority groups, agencies having a manpower training function, and public agencies such as Employment Service and the County Department of Social Welfare. The NAB Metro coordinates the efforts of all these agencies to place clients with employers. In turn, when employers have difficulty with their programs or with individual disadvantaged persons, they turn to the Metro which seeks appropriate help from the various resource agencies with which it has contact. In

this manner, the employment needs of minority disadvantaged groups are addressed, and employers have one agency to turn to when they need help--a system that protects the employers from having to deal with a multitude of organizations. Technical assistance resource people can identify these community resources and can help them in orienting NAB personnel to use them effectively.

f. Help integrate loaned executives with permanent, paid employees.

In one instance, a loaned executive transferred from a large Metro in which loaned and professional staff (that is, marketing and contracting efforts) operated as if they belonged to different organizations. The loaned executive brought that philosophy to a new but smaller NAB Metro.

A technical assistance task force person was able to integrate his efforts with those of the professional staff in the new office by holding team building sessions which pointed out how it was necessary for marketing and contracting to function together in order for the complete effort to be effective.

g. Help Metro directors re-evaluate the suitability of a company for participation in a JOBS Program. There may be instances in which the most useful service a task force volunteer can provide is to let the Metro director know that an error in judgment has been made in attempting to involve a particular company in hiring the disadvantaged. The director can then take the necessary steps to deactivate that company's program.

Experience suggests that companies with one or more of the following characteristics may not be good candidates for a JOBS program:

(1) Companies whose interest is primarily in receiving the funds available for training, and who do not feel that receiving them commits them to using them as fruitfully as possible

(2) Companies for whom it is ongoing practice to hire disadvantaged for low-pay, dead-end jobs and who see the JOBS Program as no more than an extension of this practice

(3) Companies whose overall turnover rate for employees is high and who would rather live with the problem than attempt to correct it

(4) Companies whose work force will not cooperate in the constructive absorption of disadvantaged persons

(5) Companies whose pay scale is so low that disadvantaged persons do not consider the job a desirable alternative to being unemployed or on public assistance

(6) Companies whose work flow is intermittent, since under such conditions the disadvantaged new employee will face early lay-off

(7) Companies whose jobs, though adequately paid, are of low status with no prospect of upgrading

(8) Companies with a history of turbulent industrial and human relations

(9) Companies in which unions will not tolerate the additional support services some disadvantaged need

(10) Companies with a reputation for intractable racial prejudice

(11) Companies in which the lack of management commitment is readily recognized

(12) Companies with an irreversible anti-government attitude

D. What It Cannot Do

A technical assistance task force cannot run a company program. It can provide consulting and technical assistance services, but cannot take over responsibility from company personnel for providing direct services. One exception may be in the area of orientation and supervisor training. The limited capability of some companies to conduct these activities may make it appropriate that qualified task force personnel be involved.

The relationship between the NAB Metro and the business community must be developed and sustained primarily by Metro personnel, although task force members can support that relationship and can help Metro personnel improve it.

A task force cannot properly perform administrative functions, such as the contracting and funding process, responsibility

for the proper use of funds, program responsibility of the company under contract, and monitoring the performance of the contract.

Task force members cannot displace NAB Metro technical staff--Contract Service Representatives or Manpower Coordinators--because of the special background and responsibilities of that staff. Task force personnel can, when requested, be a resource to this technical staff.

A technical assistance task force cannot set policy. It responds to requests from the Metro to provide services. It does not initiate activities without being requested to do so.

III. HOW TO DECIDE WHETHER OR NOT TO PROVIDE A TECHNICAL ASSISTANCE PROGRAM

A number of considerations should be explored and evaluated by the Metro in deciding whether it should develop a technical assistance program. This section discusses some of these considerations and provides a series of checklists which should enable the Metro leadership to make decisions.

A. The Metro Situation

One factor influencing the decisions will be the motivation of the Metro. Those Metros aggressively concerned with helping employers retain and upgrade the persons they have hired from among the disadvantaged probably will decide to provide technical assistance. Metros concerned primarily with marketing pledges are not likely to invest the considerable effort involved in developing a technical assistance program.

The Metro decisions will also be based on a candid assessment of the organization's level of activity. The Metro with vitality, energy and optimism will perceive many promising opportunities which can be strengthened by a technical assistance program. If, however, the Metro is handicapped by internal weaknesses, lack of funds to support contracts, or an unfavorable employment picture, the need for technical assistance will be minimal.

The series of checklists in this chapter will guide Metros in making their decision.

ISSUE	QUESTIONS
The Metro Situation	• Are we willing to try? • Do we possess the motivation? • Can we generate new services to employers? • Can we sustain a new thrust? • Does policy suggest supportive services to employers and the (disadvantaged) new hires? • What are the priorities?

B. Metro's Staff Resources

Before it undertakes a technical assistance program a Metro should be convinced that it is adequately staffed in terms of size and versatility. The relationship between the professional (permanent) staff and loaned executives must be supportive of a technical assistance program.

Finally, in assessing its manpower resources the local Metro can consider the type of leadership it is in position to offer. Developing and implementing a technical assistance program requires considerable initiative and effort. If the Metro leadership feels it is already burdened beyond its capacity, it is well advised not to undertake a technical assistance program.

ISSUE	QUESTIONS
Metro's Staff Resources	• Is there sufficient talent built into the office to provide technical resources?
	• Is there management skill to develop the program?
	• Who present in the office can and would provide the creative as well as the coordinated effort?
	• Who in the community could and would serve as task force manager?
	• What skills are available in the CSR and Manpower Coordinator positions? Can they stretch out to new achievements? Are they threatened by and/or opposed to the idea of technical assistance?
	• What is the potential of continuity of a technical assistance program?
	• Are loaned NAB executives on a vacation with NAB or are they eager to learn and be productive?

C. Regional and Local DOL Policy

Some of the considerations to be weighed include whether or not the DOL regional office feels that a technical assistance task force will undermine the responsibilities of the Manpower Coordinator or the CSR; whether that office sees the Employment Service as competitive with the task force or supportive of it; whether the regional office is funding high support or low support programs; and whether the relationship is favorable between the regional office personnel and the local Metro

leadership. If the regional DOL policy is uncooperative or indifferent, a local Metro is well advised not to undertake a technical assistance program.

ISSUE	QUESTIONS
Regional and Local DOL (JOBS) Policy	• Does DOL JOBS contracting office work cooperatively with NAB Metro? • Are expressed objectives mutually supportive? • Is the contracting process functional? Is it, instead, full of antagonisms and roadblocks? • Does DOL insist that technical assistance is exclusively the role of the CSR or Manpower Coordinator? • Can NAB Metro and DOL staff work together and achieve results?

D. Community Conditions

The Metro should weigh carefully community conditions--economic, social and political. This involves a critical consideration of the employers in the community with which the Metro is working, their level of sophistication and their willingness to manifest the kind of flexibility necessary to make advantageous use of technical assistance.

The Metro should also consider the needs of the disadvantaged in the community. If they are being actively integrated into the work force and

no problems with respect to them are apparent, it may be prudent not to upset the current situation by introducing technical assistance.

A Metro should also be aware of community attitudes toward technical assistance. These include the responses that can be anticipated from recognized community agencies whose cooperation will be needed (such as the public assistance resources); a commitment or lack thereof on the part of the leadership among the minority communities; and the extent of support which might be anticipated from organizations which speak for the business community--such as the Chamber of Commerce.

In addition, the Metro must be sensitive to any support it can count on from the political leadership in its community. To an increasing extent, local municipal leadership will be in a crucial position with respect to deployment of funds for manpower programs. Close and sensitive liaison between Metro leadership and the community's political leadership is mandatory if a successful technical assistance program is to be carried forward. If the Metro leadership feels that this political situation is murky or hostile, these factors should be carefully weighed in reaching a decision.

ISSUE	QUESTIONS
Community Conditions	• What help do employers want and/or need?
	• What help do the disadvantaged need?

ISSUE	QUESTIONS
Community Conditions (continued)	• Can technical assistance via NAB supply needed help?
	• What other organizations are supplying technical assistance?
	• How does NAE fit into the community pattern of social welfare?
	• How can NAB Metro coordinate with community agencies? Do they view NAB's perspective of technical assistance as competitive?
	• Does the community need some new leadership? A new spirit of coordination?
	• Do the minority communities have potential leadership that can be mobilized?
	• Do organizations seeking job placements and other supportive service groups need NAB's co-ordination role? Do employers need NAB Metro to fill that role?
	• Does the industrial base feel that technical assistance has a place?
	• Will business groups such as Chamber of Commerce support technical assistance?
	• How do the political forces in the community respond? Will they be helpful? Will they be resistant?
	• Who makes decisions on where and what funds get obligated? Does this directly support NAB's potential of providing technical assistance?

The considerations outlined above identify some of the factors a Metro should weigh as it considers becoming a base for a technical assistance effort. If, after careful self-scrutiny, it is decided that the goals of the Metro will be more fully served by providing technical assistance, the Metro staff will find in the following chapter of this manual specific suggestions for organizing and implementing such a program.

IV. ORGANIZING AND IMPLEMENTING A TECHNICAL ASSISTANCE PROGRAM

No single format can be applied nationally in organizing and implementing a technical assistance program. Decisions must take into account a number of factors: the socioeconomic characteristics of the community, the size of the Metro, the attributes of the disadvantaged population, the characteristics of the companies that are actual or potential employers of the disadvantaged, and the community's resources.

Many issues must be considered by any Metro considering such a program. This chapter identifies some of the more important issues and suggests some of the consequences of the variations that might be considered.

A. Designing an Appropriate Format for Technical Assistance

Each Metro must use its own ingenuity to design a format which meets its needs. A major decision is whether the task force is directed by someone who functions essentially as a manager or as a coordinator.

A manager provides centralized, internal leadership to the volunteer technical assistance task force. The manager (usually a generalist with a background in JOBS Programs) diagnoses the nature of the difficulty faced by the employer and either provides technical assistance himself or calls upon a member (or members) of the task force to intervene.

A Metro probably should emphasize a managing role when:

- It is large and has the resources available to support the activities of an internal manager who provides leadership and technical assistance
- It operates in a small enough geographic area to permit practical coverage by a manager and task force group
- It can recruit experienced volunteers who can provide technical assistance under a manager's leadership

Under other circumstances, someone in a Metro who knows and understands the nature of the resources offered by agencies in the community, may assume responsibility for coordinating technical assistance efforts. He can then refer employers to an appropriate agency which meets the employer's needs.

The latter format emphasizes the Metro's role in organizing a community manpower system. When the NAB Metro is able to develop the kind of credibility that allows it to gain entree into the local employers' offices on a preferred basis (as compared with other potentially competitive agencies) NAB can become the organizing and coordinating agency for all community resources related to manpower problems. The Metro that elects the coordinating role creates a link between employers and a variety of agencies that provide direct manpower services.

A Metro probably should emphasize a coordinating role when:

- It is relatively small and cannot provide a manager with broad manpower training experience
- It has responsibility over a wide area and in several communities and could not manage a centralized technical assistance effort
- There are few experienced and expert volunteers available and the Metro relies instead on community resources which may be called upon to modify their services so they become relevant to JOBS Programs

B. Selecting a Manager or Coordinator

A technical assistance manager experienced in manpower training programs for the disadvantaged should be a Metro's first choice. He will be able to deal with many inquiries himself, and he will know when to turn to more specialized resources. The following are some of the skills he should possess:

1. He should understand the organization of NAB in general and of Metros in particular.
2. He should understand the interests and points of view of employers sufficiently to take account of their needs while helping them with their training programs.
3. He should be aware of and sensitive to minority and disadvantaged cultural characteristics and attitudes.

4. He should know the resources of the community and be able to establish links with them so they become available to the technical assistance effort.

5. He should have skills as a team leader, organizer and manager.

The Metro that is in position to have a full-time task force manager might direct its recruiting efforts toward persons with one of the following backgrounds:

- EEO managers in large, sophisticated companies
- Persons successful in supervising several effective JOBS Programs
- Industrial relations managers from organizations with highly developed personnel practices
- Former managers of Community Action Programs
- Former NAB loaned executives who understand the value of technical assistance
- Managers of manpower training programs such as Concentrated Employment Program (CEP), skills centers, vocational training centers
- Persons who have effectively functioned on the staffs of welfare and human relations agencies, particularly if their former affiliation has involved cooperation with the JOBS Program

While a full-time person may be best suited to provide the leadership needed, the following are alternatives to engaging a full-time person:

1. Someone already on the Metro staff may be able to serve as part-time coordinator--most logically the Metro director, the Manpower Coordinator or a CSR.

2. In small NAB Metros, the only permanent staff member may be the Manpower Coordinator. Often, he is well enough acquainted with community businessmen and with community resources to coordinate the technical assistance effort. Even when he himself may not have had extensive experience in operating a manpower training program, he may be able to identify individuals in the community who can provide technical assistance help.

   Some small Metros are responsible for large counties. Under those circumstances, the Manpower Coordinator may be able to identify businessmen or individuals and resource agencies who, within their own towns, can enlist the participation of individuals able to provide technical assistance and resources that can provide services.

3. Under some circumstances, a member of a community agency is particularly well placed to serve as technical assistance coordinator as part of his job in his own agency, provided no conflict of interest is involved.

4. When a NAB Metro is located near a sophisticated company with good training and industrial relations skills, that company may make personnel available to take leadership in providing technical assistance.

C. Orienting Metro Staff

The technical assistance manager's first job is to educate Metro staff about technical assistance.

The orientation program should address the task, attitudes and needs of the Metro staff. In particular, the role of a technical assistance effort must be clearly defined to eliminate duplication or overlapping. Orientation should alleviate any apprehensions that NAB's staff may have of becoming involved in programs unfamiliar to them and about which they may feel uneasy.

A technical assistance effort cannot work when a plan is arbitrarily imposed on an existing Metro organization without the participation of Metro staff members in the creation of that plan, and without taking account of their interests. The orientation of Metro staff can include a number of components:

1. Representatives of Metros already engaged in technical assistance can discuss their experience.
2. Written materials describing the experiences of the New York and other NAB Metros may be obtained from the National Alliance of Businessmen headquarters office in Washington, D. C.

3. Published literature about manpower development programs can be made available to Metro staff. In particular, a number of publications of The Conference Board (The Conference Board, 1969; Janger, 1972; Janger & Shaeffer, 1970), the HIRI manual* (Glaser & Ross, 1973) and information available from NAB in Washington, D.C., describe the nature of technical assistance and its effectiveness.

4. Direct observation of training or support services programs at local skills centers, community centers, ES offices and vocational training centers.

   Other helpful experiences include observation of ongoing JOB Programs; interviews with program staff and managers; and interviews with trainees and welfare recipients.

5. Staff members from community organizations, faculty members from local colleges and universities, and representatives from management training staffs or organizations concerned with organizational development can also be helpful.

D. Organizing a Technical Assistance Task Force

1. Determining the size of the task force

   The size of the task force depends on the particular needs and complexity of the problems presented in the area the Metro serves. Some of the factors which should be considered are:

*This manual, Productive Employment of the Disadvantaged: Guidelines for Action, contains a comprehensive annotated bibliography.

- How many companies are hiring how many disadvantaged?
- To what depth do companies want assistance?
- What is the extent of problems among the disadvantaged who are being hired--that is, how hard-core are they?
- How effectively is the concept of technical assistance being marketed?

Experience suggests that one out of five companies with a contract will request extensive technical assistance--the more sophisticated the company, the greater the receptiveness of this type of assistance. In the case of volunteer non-contract programs, the ratio is reduced to one out of 12.

Usually two task force members will be required to meet the request of each company. Thus, if a Metro has 25 active contracts, probably five of those companies will want two or more task force members to provide technical assistance; doing this usually involves three or four contacts on the part of the task force member. A Metro with 200 active pledging companies might anticipate technical assistance requests from 17 companies, each requiring the participation of two or three task force members, for two or three contacts per man. All but the very largest Metros should be able to carry out their technical assistance program with a task force of eight members, provided they are judiciously chosen.

When the task force manager has identified the needs for technical assistance, he should draft a document listing those needs and presenting a preliminary plan about how a task force might address them. This draft will be helpful as he discusses possible involvement with candidates for the task force, and when he approaches their employers to explore the possibility of their time being donated.

2. Identifying candidates for the task force

The task force manager can find qualified candidates in a wide variety of places:

a. Adult school programs and vocational training departments of community colleges (specialists in remedial education as well as experienced vocational training teachers can be found in the public schools)

b. DOL-supported manpower training programs, including JOBS and other programs

c. Public manpower programs related to JOBS

d. Companies that have conducted JOBS Programs

e. Community service centers that offer a wide variety of services to disadvantaged persons

f. Large companies with EEO and Affirmative Action programs

g. Community-based agencies such as Bootstrap, the Urban League and Operation SER

h. Support service companies in the private sector

i. The regular management training staff from companies with sophisticated internal programs

j. Community and business leaders with a special interest in manpower training programs

k. Experienced loaned executives who formerly participated in the JOBS Program and who have continued to be interested

l. Former JOBS trainees who are interested in helping others through JOBS

3. Recruiting task force members

Initial, informal contacts with task force members probably will have been made while the task force manager was drafting a list of potential participants and a rough plan for service delivery. The task force manager should contact additional potential members on an informal basis. At this time, he can discuss his tentative project plan, and ask for counsel both about the plan and about his list of potential participants. The individuals he contacts may have valuable recommendations for additional candidates. During these initial conversations, the task force manager should ask whether the

candidates he has chosen feel their employers would permit them to engage in the activity on company time for a stated maximum number of hours.

It probably is not practical to request the services of anyone from an industrial setting for more than two or three days a month. Those involved in community education programs whose role it is to work with industry might be able to work on a more extended schedule on behalf of the task force. Task force volunteers who would come from manpower training programs such as skills centers might be available as needed--that is, extensively and frequently. Community agencies oriented toward community action (like Operation SER, Bootstrap, the Urban League) might be able to make available the services of their personnel on an unlimited basis--since providing these services are their reason for being.

The task force manager should then send a letter to each employer, describing the task force and its projected functions. He can explain the contribution which volunteer participation would make to the JOBS effort, indicating the potential benefits, specifying a number of hours that the request is being made for, and stating that the employer will be contacted for personal discussions later. The description of the projected program of the task force, reflecting suggestions of the candidate participants, will have been completed by this time. It should be attached to the letter to the employer.

Having been oriented by this material, the employer should be ready to discuss the possibility of his employee's participation when the task force manager comes in to talk with him.

In small communities or under other circumstances where the task force director knows many individuals in companies and resource agencies personally, the above rather formal procedure probably will not be necessary. Instead, the recruitment process becomes more personal and informal.

4. Allocating assignments

A series of meetings that includes all task force members and all Metro personnel then should be scheduled. The objective of these meetings is to become aware of the interests, duties, expertise, and availability of Metro staff members and task force volunteers. These meetings should be conducted by a person who has had experience in team building. They should be held over a long enough time period so that personal relationships can be formed and feelings of trust developed. Including lunch and dinner in the program can foster the development of informal relationships.

Subsequent meetings should be held periodically to reinforce personal contact and to work out areas in which conflict may have arisen.

During the initial meetings, plans should be devised to coordinate task force functioning with Metro functioning. They should include

a plan for marketing of technical assistance by Metro staff and a way in which referrals will be processed by the Metro and the task force manager.

When these plans have been agreed upon, the document describing the task force and how it might function should be updated. This document can be used in marketing technical assistance by loaned executive solicitors and other Metro personnel.

In allocating assignments to task force members, task force managers should be sensitive to a number of potential problems. For example, a company may not be willing to work in an open and trusting relationship with a volunteer who comes from another company that is actively competitive with them. Despite the fact that such a volunteer has the advantage of first-hand familiarity with the type of business organization he is helping, this advantage may, in the eyes of the recipient company, be offset by the risk of divulging trade secrets.

Other companies may express a willingness to hire disadvantaged persons from minority groups, but actually may be harboring deeply rooted racial prejudices. If the task force volunteer is a member of a minority group, his expertise may be resisted even though his presence is not openly rejected.

Task force members must also be cautioned to be sensitive to the pace, sophistication and traditions of the recipient company.

Although the volunteer may be skillful and enthusiastic, he cannot impose new ways of doing things that are not consistent with the practices of the company he is helping.

> A minority task force volunteer with considerable experience in large companies with advanced industrial relations policies was asked to help a small company which recently had hired four minority trainees. Upon going to the company, he discovered that its difficulties with these trainees were rooted in its general industrial relations practices rather than in some specific problems involving the trainees. He was advised to deal with the problem superficially, because otherwise the company would not tolerate his intervention.

A task force member should not only be judicious about the level at which he intervenes, but he also should be on the lookout for the pervasiveness of the commitment to the JOBS Program in the recipient company. He may find that his direct contact in the recipient company shares his enthusiasm, but that the rest of the company is apathetic. Unless he can modify that attitude (or get the Metro director to help him modify it), his efforts may be negligible.

In some situations, the presence of a task force member in a company may provide an opportunity for company spokesmen to air feelings they may not have shared with the Metro. There have been instances in which a profound resistance to following through on any program involving a government agency is expressed. The task force member should listen in an accepting manner, determine whether this

attitude will seriously interfere with his specific mission, undertake to reshape the attitude if he feels that is possible, or, in some instances, report the situation to the Metro director.

The assignments available for task force members may be intermittent and it is desirable to maintain the force as a cohesive unit. Accordingly, it is suggested that a Metro director utilize these experts in a number of helpful ways during the periods when they are not in the field. Among them:

a. Help organize and conduct awareness training sessions for employers.

b. Conduct training sessions for the Metro staff.

c. Conduct team-building sessions for Metro staff.

d. Review existing contracts with CSRs to determine areas where special services might be needed.

e. Help the Metro better coordinate its role in the community.

f. Provide training sessions for ES staffs.

g. Stimulate cooperation rather than competition between community manpower agencies and the Metro.

h. Assist NAB solicitors to interpret programs to employers.

i. Help prepare forthcoming pledge campaigns.

Members of the task force should meet regularly, on a formal, pre-arranged schedule. Members of the Metro staff should also attend these meetings so that there can be a productive exchange of experiences and new developments.

5. Coordinating task force activities

Following are a few examples of how task force management can coordinate the activities of Metro staff and task force members in the course of providing technical assistance to employers:

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A large aerospace firm with highly developed skills in personnel practices and training felt the need for task force assistance in the area of job-related education. They did not have educators on their staff able to fulfill this requirement and, because of the short duration of the training time, did not wish to hire additional staff just for that job. The task force manager discussed this need with the local adult high school district. The high school had personnel knowledgeable in this area and was flexible enough to generate a program to fully satisfy the JRE requirements at the plant site.

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A manufacturer of fasteners and other seat-belt equipment had five prospective trainees and wanted a JOBS Program. However, the company felt unqualified to perform adequately in two areas of the JOBS requirements: counseling and orientation. The manager

of the task force suggested a review of the requirements and of capabilities that existed within the company. The task force manager arranged for the supervisors of this company to meet with a JOBS Program manager of a comparable manufacturing firm in order to make the supervisors sufficiently aware of the need for orientation and counseling and to help them identify appropriate in-house staff to handle the requirements of the trainees. The process here was one of exposure, giving the company insight into the operation of a comparable JOBS Program elsewhere.

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An employer conducting a small animal shelter and hospital had hired two trainees. One was a source of a series of problems to the employer. Before he was willing to hire a third, he asked for help in how to handle recurrent personnel problems he anticipated. The task force manager assessed the situation and concluded that the particular employer was simply not able to cope with many personnel problems. He arranged to have a skilled vocational counselor at a local skills center refer a very steady and reliable trainee whom he knew personally. Thus, a very select and precise recruitment and selection approach eliminated a problem with which the employer was unable to deal.

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A NAB job developer tried a number of times to convince an employer to hire a number of disadvantaged unemployed. He decided to seek the help of another employer of a similar size and structure who had enjoyed a successful JOBS Program. The job developer asked the task force manager for assistance. An employer was found who was able and willing to help with the marketing job. Next, an appointment was set up with the NAB job developer, the employer with experience and the reluctant employer to solicit his pledge. The experienced employer discussed his good experience with JOBS and the prospective employer decided to undertake a program.

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An employer recently was informed that his new contract with the federal government was in jeopardy because of his failure to begin an EEO program. The task force manager was asked to review his needs and guided the employer through a number of steps, including: a) a review of the relevant laws; b) a review of manpower needs with his managers; c) drafting a program design to satisfy EEO requirements; d) a review of Affirmative Action programs, from which a JOBS upgrading program could be suggested.

The task force manager arranged for a series of three meetings to be conducted by task force members. The first meeting was conducted by a member who is a manager of an EEO office of an aerospace firm. He reviewed the laws and helped write a company plan. Secondly, a company project manager of an upgrading program discussed how to initiate such an activity. And, finally, a third task force member held awareness training sessions for the supervisory group to help them cope with the new company requirements.

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A report was received by the NAB Metro director in a large city that a company was having two kinds of problems with trainees entering their program. One problem was that Mexican-Americans would not go to the State Service Center to apply and, secondly, the supervisors felt that some trainees presently on the job were often absent due to the use of drugs. The NAB Metro director relayed this to the task force manager. The task force manager visited the plant to review the request for assistance, and then called upon three task force members to plan a service to the plant.

A team was put together for this task, consisting of one task force member skilled at Mexican-American recruitment, one member able to deal with drug-related subjects, and one member experienced in conducting supervisory training on techniques to deal with the disadvantaged who may be using drugs.

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A company in a smaller community received a funded contract to hire ten technical aides. This was a small but sophisticated engineering firm with good personnel practices. It called the NAB Metro's Manpower Coordinator (who is, in essence, the Metro director and the task force director all in one), and requested help in the design of an OJT plan for the ten technical aides. The task force director called the local community college and arranged for a task force member recruited from this resource to meet with the company training project director to plan the program.

E. Using Community Resources

Most communities have a variety of agencies established primarily to serve disadvantaged persons. In some instances, all these agencies join together to enhance their potential usefulness to the target group.

In other communities, rivalries may impair a coordinated effort. Each NAB Metro should be alert to how its particular community functions in this regard. It should find ways to channel the expertise and goodwill normally found in these agencies into an effective force to help meet the program goals.

One Metro office described its approach to utilization of community resources as follows:

1. The Metro develops a working team relationship with all agencies endeavoring to train and place disadvantaged persons in private employment.

2. The Metro finds job openings with employers through the normal pledge process and through the efforts of job developers in other agencies,

and refers the openings to training and placement organizations.

3. The Metro encourages employers engaging in this process to seek technical assistance through the Metro for problems connected with training.

4. The Metro refers employer requests for help to the most appropriate agency to provide that assistance.

Another NAB Metro began by making an exhaustive list of the kinds of problems employers and JOBS trainees typically have during the hiring and training process. Then they attempted to match this list by identifying resources in the community that were available to address each problem. Finally, the Metro established personal contact with individuals in those agencies to learn more about agency capability to provide assistance and to establish an expeditious referral process. As the Metro developed an understanding of the needs of employers and knowledge about the strength of each resource organization, it could refer inquiring employers to the appropriate resource agency with increasing effectiveness.

Public education facilities can be a particularly valuable source of service and technical assistance to employers. City schools with vocational training departments, adult education programs in high schools, community colleges and other colleges and universities have proven to be extraordinarily responsive to requests from NAB Metros for technical assistance. Some Metros also have used the educational system to train their own new staff as well as to produce supervisory training programs.

F. Marketing the Task Force Effort

A Metro cannot assume that a task force, once organized, will create its own market. Employers should be repeatedly reminded of the existence and availability of this corps of experts, and their potential usefulness should be stressed whenever there is occasion for a contact between a Metro spokesman and an employer. Among the specific marketing devices suggested are:

1. In all correspondence between the Metro and employers, the role of the task force should be mentioned.

2. When Metro solicitors are in contact with employers, they should remind the latter that the services provided by NAB include the availability of task force expertise.

3. The Metro director might find it advisable to develop a special bulletin or newsletter, for distribution to all employers, detailing the ways in which the task force can be of assistance.

4. After the receipt of each new pledge, the Metro director might write a thank-you note to the pledging company, and in it specifically call attention to the task force.

5. The DOL/JOBS offices can be helpful in indoctrinating CSRs and Manpower Coordinators with the concept that the success of the JOBS effort can be strengthened by encouraging employers to make use of technical assistance.

6. Companies who have had successful experiences with the use of technical assistance should be recruited to relate their experiences to other companies.

7. Task force members themselves can take an aggressive role in the marketing activity, reporting on their experiences to their own business and professional associates with the expectation that the word will spread informally through unofficial channels of communications.

G. Assessment of Task Force Performance

In many instances, task force members may work cooperatively with Metro staff in assessing the outcomes of the JOBS Program.

By the same token, the performance of the task force itself should be periodically assessed. This is done most appropriately by the Metro director. To provide focus to his assessment, the following checklist has been developed.

ISSUE	QUESTIONS
How does the NAB Metro feel about the task force?	• Is the atmosphere in the office more productive, more stimulated, or no change?
	• Are loaned executives getting better training? Are they responding positively?
	• Do CSRs feel the service is helpful? Does Manpower Coordinator welcome the service? Do they feel

ISSUE	QUESTION
How does the NAB Metro feel about the task force? (continued)	its positive effects, or are they concerned or threatened by its presence? Do they make referrals? Do they ask for task force intervention in their caseloads?
What has been the impact of the task force on employer?	• Do employers request task force assistance?
	• Do employers accepting the service express appreciation?
	• Do they request additional services?
	• Do they make referrals to other companies?
	• Do they become more willing to provide quality services to employees?
	• Is the employer-NAB relationship improved as a result of the task force?
	• Has the pledge campaign improved?
	• Are more pledges being turned into hires?
	• Are low support companies more willing to ask for assistance?
	• Do other NAB Metros seem anxious to learn about the task force?
How has the task force affected NAB Metro's role in the community?	• Are community agencies aware of the services?
	• Do they request task force training of their staff?
	• Are they responsive to the services?

ISSUE	QUESTION
How has the task force affected NAB Metro's role in the community? (continued)	• Do they appreciate the new expertise or do they feel it competitive and threatening? • Has the task force been able to improve upon the coordination of NAB and Employment Service?
How do task force members feel about their accomplishment?	• Do task force members feel they are making a contribution? • Do they feel gratified about their employer and disadvantaged contacts? • Do they get an appreciative response from the NAB staff, especially the loaned executive? • Are they inspired to continue? • Are they producing new ideas; are they creative? • Are they functioning as advocates for technical assistance in their own organizations?

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This guide summarizes what has been learned in recent years about the effective use of a volunteer technical assistance task force in implementing a JOBS Program. It presents proven procedures for making the best use of such a corps of experts. It is hoped that it will strengthen the program of present and future employers taking constructive action to find permanent places in the work force for disadvantaged persons.